

Fig. 1

39 Search

41 Agent

43 Last

45 Update

ADD

37

Internet Portal.com (personalized page)

Server Name	User Name	Password
LBC.com	John Doe	XXXXXXX
My Bank.com	John R. Doe	XXXXXX
My Stocks.com	John R. Doe	XXXXXXXXXX
My Shopping.com	Jane L. Doe	XXXXXXX
Mortgage.Com	John/Jane Doe	XXXXXXXXXX
Airline.com	John Doe	XXXXXXX

32

35

34

Search String

51

52 Search

Fig. 2

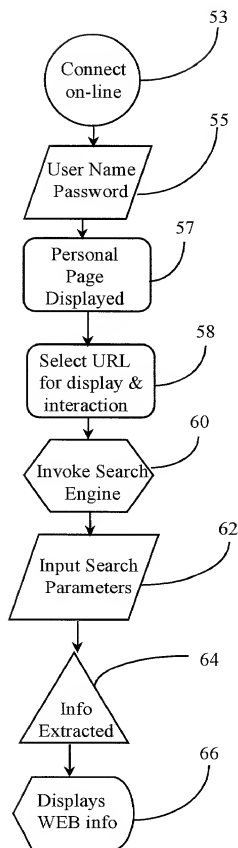


Fig. 3

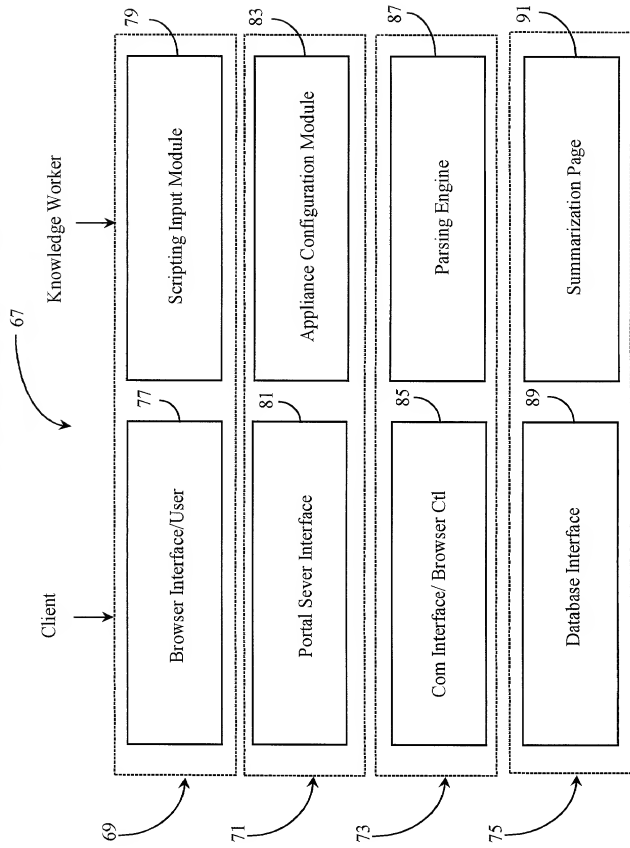


Fig. 4

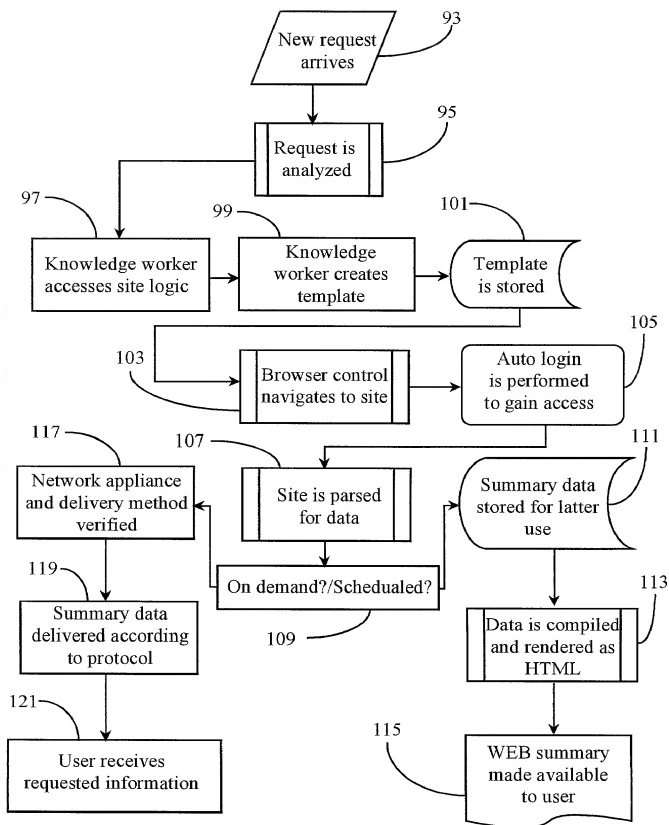


Fig. 5

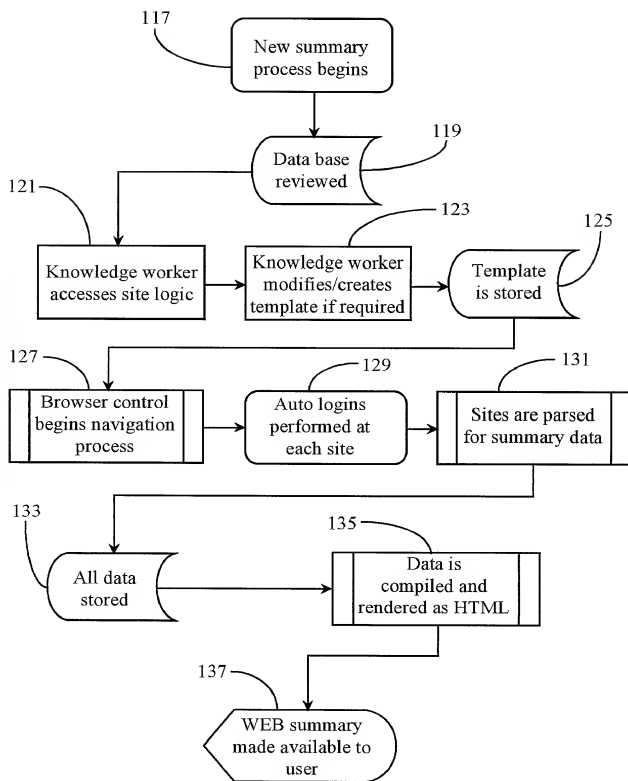


Fig. 6

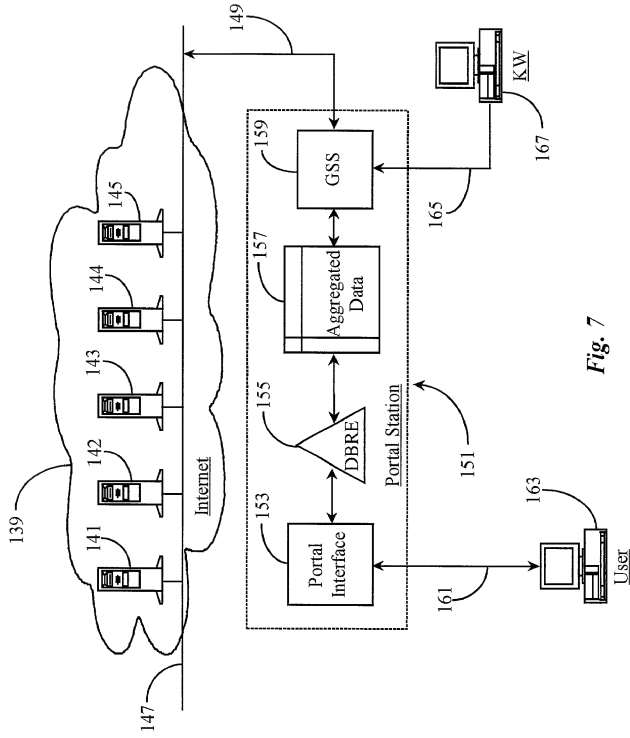


Fig. 7

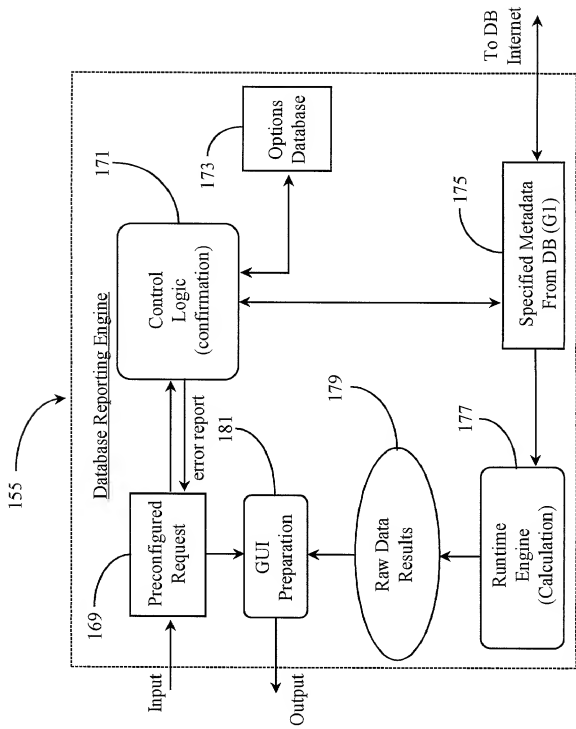


Fig. 8

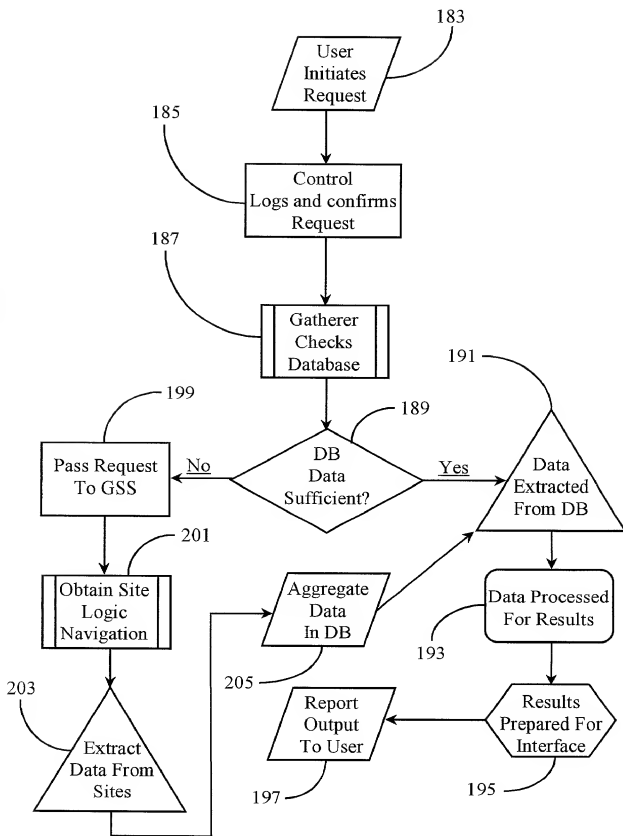


Fig. 9

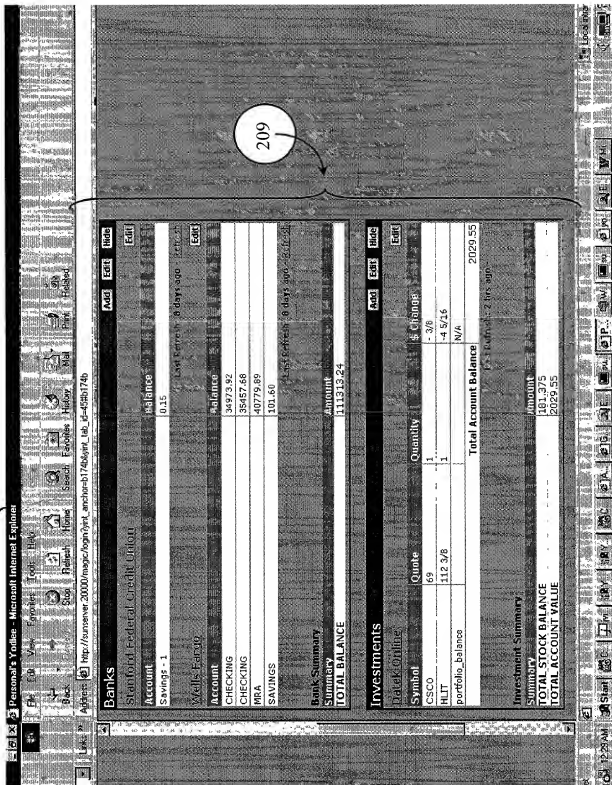


Fig. 10

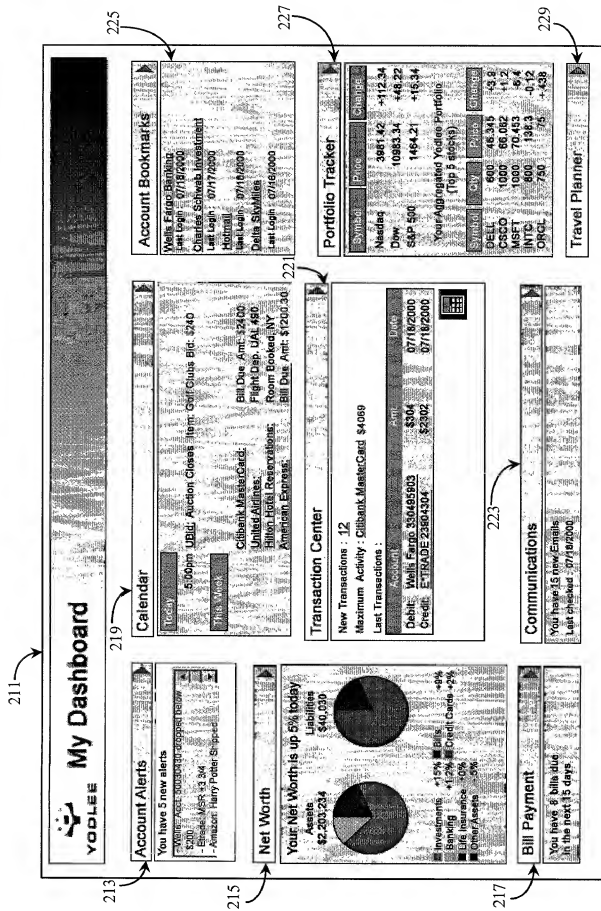



Fig. 11


My Dashboard

TRANSACTION CENTER

Tuesday, July 18th

243

New Transaction Summary

Chase Visa Credit Card : 5 new transactions
Wells Fargo Savings : 3 new transactions
Wells Fargo Checking : 2 new transactions
E-TRADE : 2 new transactions

245

Select an Account

Chase Visa Credit

247

Date	Description	Amount	Category	Delete	Archive
07/14/2000	Pizza Hut, San Jose CA	\$34.12	Dining Out	<input type="checkbox"/>	<input type="checkbox"/>
07/15/2000	AT&T Wireless, CA	\$19.99	Utilities	<input type="checkbox"/>	<input type="checkbox"/>
07/16/2000	BEST BUY, Redwood Cty, CA	\$340.23	Home	<input type="checkbox"/>	<input checked="" type="checkbox"/>
07/17/2000	Honda City, San Jose, CA	\$72.54	Auto	<input type="checkbox"/>	<input type="checkbox"/>
07/18/2000	Barnes and Noble, San Jose CA	\$13.02	Misc.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

249

Email My CPA

View History

Bill Payment

251

253

255

Fig. 13

257

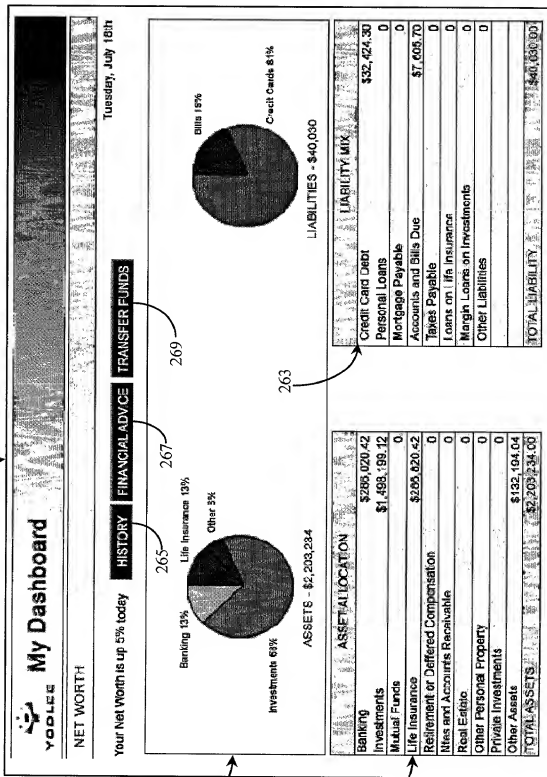


Fig. 14

271

YODLEE My Dashboard

CONSOLIDATED PORTFOLIO TRACKER

Tuesday, July 18th

279

Your Yodlee Consolidated Portfolio:

275

Symbol	Name	Quantity	Price	Est. Value	View Individual Holdings
DELL	Dell Computer Systems	1500	46.345	\$69,517.50	Go
CSOO	Cisco Systems	2000	66.062	\$132,124.00	Go
MSFT	Microsoft Corporation	1200	70.453	\$84,543.60	Go
INTC	Intel Corporation	3000	138.3	\$414,900.00	Go
ORCL	Oracle Corporation	4500	75	\$337,500.00	Go
EXOS	Exodus Communications	200	85.47	\$17,094.00	Go
				TOTAL POSITION VALUE: \$1,125,186.00	

273

Include the following Accounts:

- ☒ Charles Schwab
- ☐ TD Waterhouse
- ☒ Fidelity 401K
- ☒ Roth IRA
- ☒ E*TRADE
- ☒ Merrill Lynch

Fig. 15

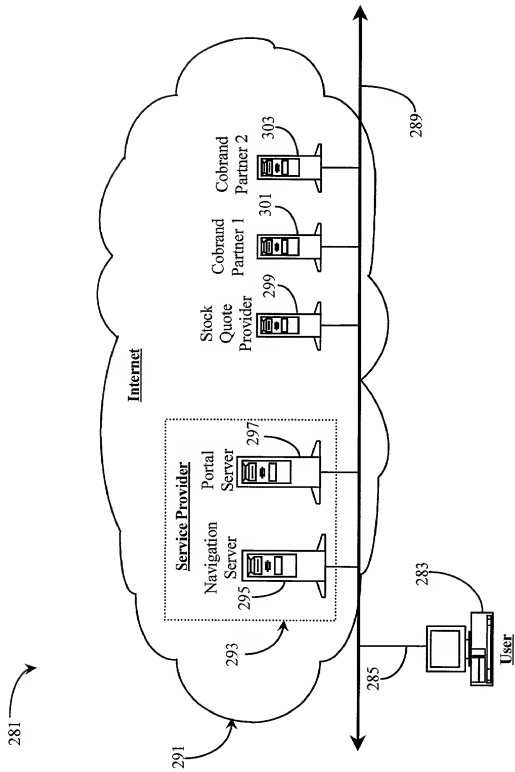
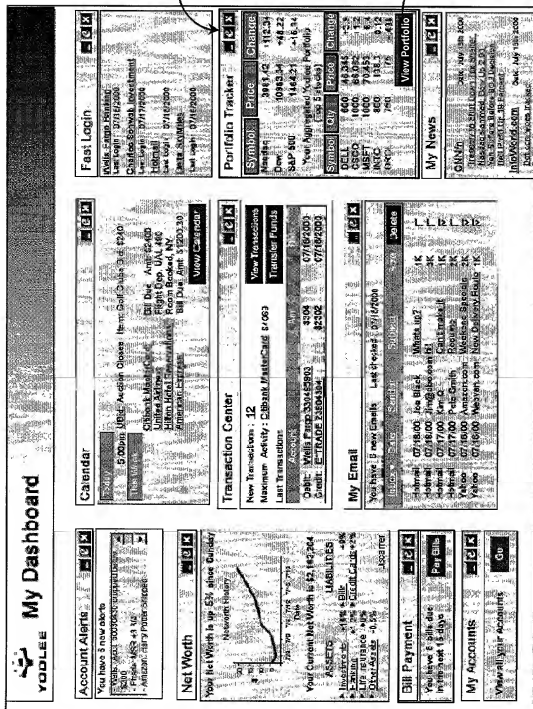
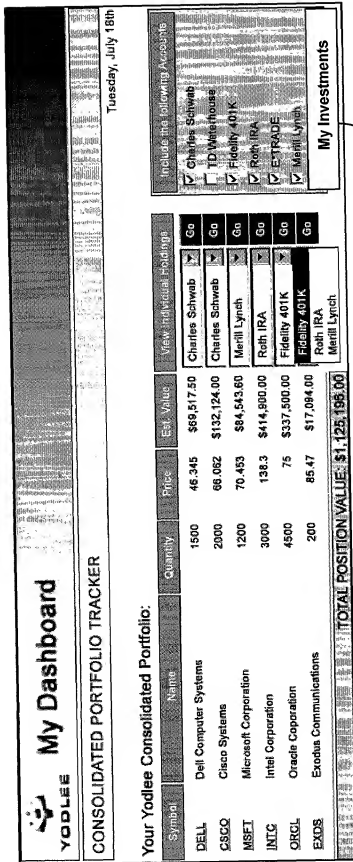


Fig. 16





271

313

Portfolio Tracker

Fig. 18

704040" 6992860

My Investments

My Investments					Get Quote
Symbol	Quantity	Price	As of	\$ Change	Calculated Value
AOL	100	53.000	12/34	+1.50	5,300.00
EMC	--	92.125	--	-1.75	--
FMAGX	50	38.660	10/09	+ .25	6,933.00
MSFT	50	72.190	12/36	+1.15	3,609.38
Cash	--	--	--	--	2,375.12
Total Value					18,217.50
Price, as of and \$ Change provided by S&P Comstock					Get Quote

315

317

Fig. 19

View Investment Account

Select Investment Account

You have shares of INTC in more than one account.
Select the account you would like to view.

- ☒ Charles Schwab
- ☐ Paine Webber
- ☐ E*Trade

Cancel

OK

319

Fig. 20

Select Securities

Select Securities

Select the investment accounts you want to track in your portfolio.

Don't see your brokerage account?

- ☒ Charles Schwab
- ☒ Paine Webber
- ☒ E*Trade

[Add a New Account](#)

Select the indices you want to track in your portfolio.

- ☒ Dow Jones Industrial Average
- ☒ NASDAQ Composite
- ☒ S&P 500

Enter symbols for other stocks and funds you want to track, separated by commas.

EMC

[Cancel](#)

[Update Portfolio Now](#)

Fig. 21